




»»» CORPORATE SOCIAL RESPONSIBILITY REPORT 2020

# Transforming communities so businesses and people thrive

 **Insperity**<sup>®</sup>  
*HR that Makes a Difference*<sup>™</sup>

A portrait of Paul J. Sarvadi, a middle-aged man with a grey beard and balding head, smiling. He is wearing a light blue button-down shirt and a green patterned blazer. The background is a blurred indoor setting with greenery and warm lights.

**“This past year we have  
all been through a variety  
of traumatic experiences –  
both individually and  
collectively.”**

Paul J. Sarvadi  
Chairman and CEO  
Insperity

During challenging times, we pause and reflect on what we've experienced and what we value. As I think about the enormity of the obstacles we faced and continue to face, I want to remind business leaders to focus on the most positive factor helping us rise above the challenges: our employees. They have and continue to demonstrate a resiliency and dedication to each other, their communities and companies that is unmatched.



For employees to continue being engaged and productive, business leaders and owners should look to their company's culture. A clearly defined and reinforced culture provides the support employees need to continue moving forward. Now is the time to reflect on your culture and how it can be strengthened as we gradually transition back to the workplace.

At year's end, I thought about the bedrock values of Insperity's culture and how well it supported Insperity employees throughout the past year. Some of the ways our employees embodied that culture are by:

- Showing **integrity** by pivoting immediately to remote work and not missing a beat, supporting and meeting the intense needs of clients, employees and families.
- Demonstrating **respect for the worth of the individual**, helping clients address emotional needs of their employees experiencing isolation from stay at home orders, and providing diversity, equity and inclusion support in the midst of social unrest.
- Setting the example of **servant leadership and teamwork** as they assumed more responsibilities, supported one another, and put the needs of others ahead of their own.
- Adhering to **high standards and the pursuit of excellence** through client service, thought leadership and careful, measured work despite challenging conditions.
- Continuing to embrace **accountability to elevate performance** for clients and the public.
- Creating new **innovations to drive success**: identifying new ways of working, stronger cross communication, speed of execution and always asking how can they do better.
- **Embracing change** throughout by working remotely, implementing safety protocol in the workplace, adopting new technologies and addressing customer challenges.
- **Contributing to their communities** virtually, in-person, individually and organizationally.

2020 was a challenging year, but we are looking forward to brighter days ahead. It is the continued perseverance and faith of our teams which leads me to be so optimistic about our future.

# Neighbors helping neighbors



**586** employees donated time

**\$3.7M+**

was given in monetary and in-kind charitable donations

**20,414**

hours donated to the hardship bank

**36**

corporate employees received help from the Insperty Fund, a corporate employee benevolence program established to provide financial assistance during life-changing challenges

**53**

employees benefited from the hardship bank

## EMPLOYEES HELPING EACH OTHER

In 2020, Insperty employees donated hours to the paid-time-off hardship bank, a benefit to support corporate employees needing to take a leave of absence, and their co-workers benefited from their generosity.



**\$266,808** was donated to the Insperty Fund

# Community impact

Not only is involvement in the community an Insperity core value, it's also a calling for our corporate employees to make a difference in the lives of others.

This philanthropic action, combined with corporate financial investments and conservation initiatives, has allowed us to enrich countless lives and contribute to our reputation of responsible business stewardship. The Insperity Corporate Social Responsibility Report highlights our 2020 performance in three key areas and demonstrates our commitment to our clients, employees and local communities.

**77%** OF NEW EMPLOYEES SAID THAT OUR COMMITMENT TO COMMUNITIES WAS A MOTIVATING FACTOR FOR JOINING INSPERITY



HAAM - Humble Area Assistance Ministries volunteer effort, January 16, 2020.

# Corporate human resources

Insperty strives to create a culture where corporate employees gain a greater sense of purpose, value performance, and feel part of an organization that redefines corporate philanthropy and work-life balance.



**19** employees of the year were recognized through our MVP (Mission Values Performance) program for their outstanding job performance

**2** volunteers of the year were celebrated through our MVP (Mission Values Performance) program for their outstanding volunteer efforts

**215** new corporate employees attended Introduction to Insperty (i2i) orientation

**85** managers attended Introduction to Insperty (i2i) orientation

**6.88** years average employee tenure, well above the U.S. Bureau of Labor Statistics average of 4.3 years

# Diversity, equity & inclusion

Insperity recognizes that diversity, equity and inclusion, or DE&I, has become increasingly critical to the success of any organization and is an integral business strategy. We believe that every employee should be treated with respect and acknowledge that building a workplace that values the worth of each individual takes time, effort, and dedication. We believe that a strong values based, culture driven, and people centric approach is the best method to reach the goals of DE&I. Our service teams bring large company expertise to small and medium sized business, assisting or augmenting their DE&I efforts by assessing, strategizing, and creating DE&I training opportunities, as well as providing guidance for best practices for success. As an HR services provider, Insperity is well positioned to help its own employees as well as employees of small and medium size businesses across the country benefit from a workplace that cultivates DE&I.

# Safe and secure

**18**

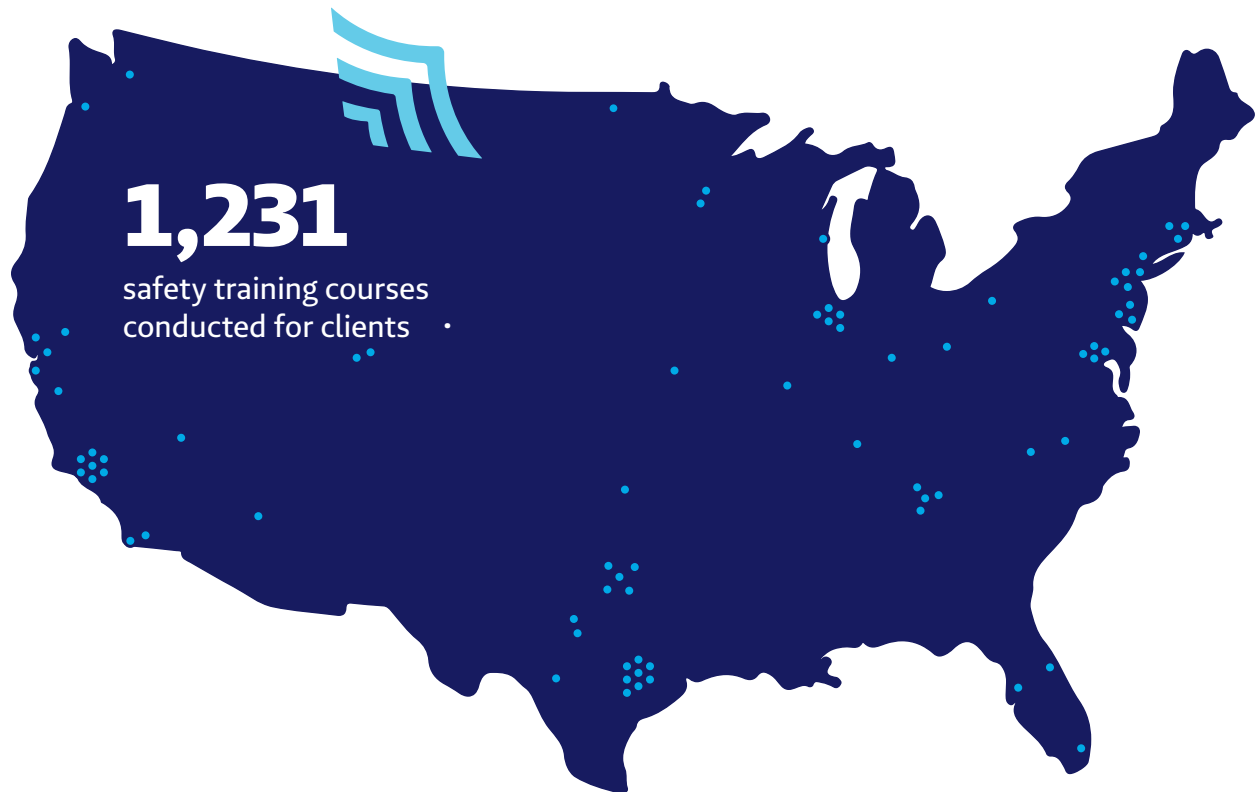
Insperty safety consultants/outreach trainers/professional development training

**95**

safety training courses for Insperty managers and supervisors

**106**

outreach courses conducted for clients



# Health and welfare

**30**

Lunch and Learns, focused on behavioral health topics, coordinated through Optum

**325**

attendees at inaugural virtual Benefits Expo

**18**

Benefits Expo vendors





# Conservation initiatives

463,400 pounds of paper are recycled through our conservation efforts

Our recycling efforts are the equivalent of saving:

**3,940**

trees saved

**88K**

gallons of oil

**1.62M**

gallons of water

**695**

cubic yards landfill space

# Answering the call of the COVID-19 pandemic

Insperty was built for times like this – to guide our employees and clients through the unknown. Here’s a look at our response to the COVID-19 pandemic, and how we supported our employees and helped our clients rise above the challenges.

## March 2020

Client and employee communications from Insperty leadership begin

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Daily COVID-19 employee updates begin

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Remote work begins for employees

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Tools and protocol in place for continued service to clients

## May 2020

Return to workplace strategy shared with employees

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Voluntary return to workplace begins for employees based on location and county governance

## Our support throughout 2020 in numbers



**COVID-19  
trainings**

**1,228**

number completed  
by corporate employees

**9,372**

number completed  
by clients



**HR client  
support center**

**155%**

increase in calls to  
support center hotline

**270%**

increase in support center  
team's weekly workload

**3x**

amount of daily client  
interactions with support  
center team compared  
to 2019

**2x**

amount of weekly  
client inquires  
compared to 2019



**Volunteer  
events**

**93%**

number of Insperity  
locations that participated

**49%**

number of events  
that were virtual



**Paycheck  
Protection  
Program Cares  
Act support**

Supported our clients  
with reports and  
paperwork to put their  
PPP loan applications  
at the head of the queue

**59%**

of client applicants  
received PPP funds  
in the initial round,  
versus 20% of overall  
national applicants

# Appendix

## ENVIRONMENTAL RISKS AND PRIORITIES

Insperty provides an array of human resources and business solutions designed to help improve business performance. As a professional services company, we continue to identify, understand and manage environmental risks and opportunities that impact our business and inform our corporate social responsibility strategy. Although the environmental footprint of our products and services, facilities and supply chain is relatively small, we recognize the importance of understanding, measuring and managing the impact that our business and operations have on the environment.

## AREAS WHERE OUR BUSINESS AND OPERATIONS HAVE AN ENVIRONMENTAL IMPACT:

- **Energy consumption and carbon emissions** – As of Dec. 31, 2020, Insperty had 80+ offices in the United States, including 65 sales offices in 40 markets. These offices require energy to power the facilities and office equipment within each location, as well as associated emissions.
- **Business travel** – Air travel is a necessary part of conducting business at Insperty. It is important that our executives, Business Performance Advisors and operational representatives travel to market, sell and also deliver our services.
- **Waste** – Based on the nature of our work, our business operations do not require the use of, and Insperty does not generate, any hazardous materials, and we do not manufacture products. However, we do consume office supplies and equipment at the offices we operate throughout the United States, including our corporate headquarters.

## ENVIRONMENTAL POLICY

Insperty is committed to conducting business in an environmentally responsible manner, which includes understanding and managing our environmental impacts and risks and improving our enterprise-wide environmental footprint. To date, we have implemented various programs and initiatives to reduce our environmental impact and will continue to implement environmentally responsible business practices across all Insperty operations. As we further assess our enterprise-wide environmental footprint, we are coordinating with multiple leasing partners and vendors to better understand our energy use, waste management and business travel.

## ENVIRONMENTAL PROGRAMS AND INITIATIVES IMPLEMENTED BY INSPERTY FOCUS ON A VARIETY OF AREAS:

- **Green buildings** – Prioritize energy efficient, healthy buildings for our employees and community. An example of such an initiative is the construction of our new LEED–certified 270,000 square foot office facility at our corporate headquarters. The Leadership in Energy and Environmental Design (LEED) certification means the workplace will be internationally recognized as healthy, highly efficient, cost effective and green.
- **Energy efficiency** – Manage and reduce our energy consumption at a facilities level and identify and purchase energy efficient technology
- **Recycling** – Minimize our paper waste, as well as a widespread paper recycling program
- **Reporting** – Increase transparency about our environmental footprint to improve our environmental performance and further meet stakeholders’ expectations for disclosure

Environmental commitments, programs and initiatives are generally reviewed and revised by the Corporate Real Estate department on a regular basis, and the department has day-to-day responsibility for implementation.

## HUMAN RIGHTS POLICY

Consistent with our values and our Code of Business Conduct and Ethics (the Code), Insperty recognizes the important responsibility we have to respect human rights as we help businesses succeed so communities prosper.

We support and respect human rights as expressed in the Universal Declaration of Human Rights.

To that end, we strive to respect human rights throughout our operations, products and services, including consistent treatment among people, employee well-being, and safety and economic and social freedom. We focus on areas of our business where we have the greatest impact and are committed to:

- Equal opportunity
- Eliminating human trafficking, slavery, servitude and forced or compulsory labor
- Abolishing child labor
- Respecting the right of our employees to form and to freely join (or not join) legally constituted representative bodies, and working in good faith with them
- Health, safety and security
- Data privacy
- Anti-corruption

Insperty's policy is to be a good corporate citizen.

Wherever we do business, each of us is required to comply with applicable human rights laws, rules and regulations.

This means following the spirit of the law and doing the right, ethical thing even when the law is not specific.



# Insperty CSR Report content index

The CSR Report Context Index is a tool to help stakeholders better access Insperty’s environmental, social and governance information. The index references Global Reporting Initiative (GRI) standards.

## GENERAL DISCLOSURES

DISCLOSURE	GRI STANDARD	INSPERTY RESPONSE, PAGE OR LINK
Name of the organization	102-1	Insperty, Inc.
Activities, brands, products and services	102-2	<p>We provide an array of human resources (HR) and business solutions designed to help improve business performance. Our most comprehensive HR services offerings are provided through our Workforce Optimization® and Workforce Synchronization™ offerings (together, our PEO HR outsourcing solutions), which encompass a broad range of human resources functions, including payroll and employment administration, employee benefits, workers’ compensation, government compliance, performance management and training and development services, along with our cloud-based human capital management platform, Insperty Premier™.</p> <p>Additional information can be found in the <a href="#">Annual Report</a>.</p>
Location of headquarters	102-3	19001 Crescent Springs Dr. Kingwood, Texas 77339-3802
Location of operations	102-4	As of Dec. 31, 2020, Insperty had 80+ offices, including 65 sales offices in 40 markets.
Ownership and legal form	102-5	<a href="#">Annual Report</a>
Markets served	102-6	<a href="#">Annual Report</a>
Scale of the organization	102-7	<a href="#">Annual Report</a>
Information on employees and other workers	102-8	<p>As of Dec. 31, 2020, we had approximately 3,540 corporate employees.</p> <p>Additional information can be found in the <a href="#">Annual Report</a>.</p>
Values, principles, standards and norms of behavior	102-16	<a href="#">Code of Conduct</a> – Introduction
Mechanisms for advice and concerns about ethics	102-17	<a href="#">Code of Conduct</a>
Governance structure	102-18	<a href="#">Annual Report</a>
Highest governance body’s role in sustainability reporting	102-32	The executive director of Corporate Citizenship, in consultation with a cross-functional CSR group

DISCLOSURE	GRI STANDARD	INSPERITY RESPONSE, PAGE OR LINK
Remuneration policies	102-35	<a href="#">Proxy Statement</a>
Process for determining remuneration	102-36	<a href="#">Proxy Statement</a>
Stakeholders' involvement in remuneration	102-37	<a href="#">Proxy Statement</a>
Reporting period	102-50	Jan. 1, 2020 – Dec. 31, 2020
Date of most recent report	102-51	April 20, 2021
Reporting cycle	102-52	Annually
Contact point for questions regarding the report	102-53	Executive director of Corporate Citizenship, Corinn Price <a href="mailto:corporate.citizenship@insperity.com">corporate.citizenship@insperity.com</a>

## ECONOMIC DISCLOSURES

DISCLOSURE	GRI STANDARD	INSPERITY RESPONSE, PAGE OR LINK
Communication and training about anti-corruption policies and procedures	205-2	<p>All employees review and certify they understand and agree to the Code, including anti-corruption policies and procedures, on an annual basis.</p> <p>As further outlined in the Code, each employee is expected to promptly report any suspected or actual violations of the Code, any applicable law, rule or regulation, our contractual undertakings or any other unethical behavior to their immediate manager, their management team member, the general counsel, the finance, risk management and audit committee, or to Ethicspoint. Additional information can be found in the <a href="#">Code of Conduct</a>.</p>

## ENVIRONMENTAL DISCLOSURES

DISCLOSURE	GRI STANDARD	INSPERITY RESPONSE, PAGE OR LINK
Identifying and managing environmental impacts	102-29	Environmental Risk and Policy Statement CSR Report: p. 12
Recycled input materials used	301	CSR Report: p. 5

## SOCIAL DISCLOSURES

DISCLOSURE	GRI STANDARD	INSPERITY RESPONSE, PAGE OR LINK
Identifying and managing human rights	102-29	Human Rights Policy Statement. CSR Report: p. 13
Occupational health and safety	403	CSR Report: p. 8
Employee training	404	CSR Report: p. 6
Operations with local community engagement, impact assessments and development programs	413-1	CSR Report: p. 4 – 5
Political contributions	415	<a href="#">Code of Conduct</a> – Public Service
Substantiated complaints regarding breaches of customer privacy and losses of customer data	418	<a href="#">Privacy Policy</a>

